

Atty Donaldson, Larry A., sole practitioner (for Mary Sue Lancaster, Administrator)

## Petition for Final Distribution

DOD: 1/6/2009		<b>MARY SUE LANCASTER</b> , sister and Administrator, is Petitioner.  Accounting is waived.  I & A — <b>\$164,886.42</b> POH — <b>\$164,886.42</b> (\$6,511.42 is cash)  Administrator — <b>not requested</b>  Attorney — <b>not requested</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Continued from 5/13/14.</b></u> Minute Order shows appearance by Larry Donaldson and states counsel requests a continuance.  <b>The following issues remain:</b>  1. <i>Final Inventory and Appraisal</i> filed on 1/29/2014 is incomplete at Item 5 re: property tax certificate, as required by Probate Code § 8800(d). Need statement regarding Property Tax Certificate. (Revenue and Tax Code § 480.)  2. <i>Petition</i> does not contain a statement regarding whether notice has been sent to the Franchise Tax Board as required pursuant to Probate Code 9202(c)(1) for estates in which <i>Letters</i> were issued 7/1/2008 or after, and Court records contain no proof of service of such notice. Need proof of service of notice to the Franchise Tax Board pursuant to Probate Code 9202(c)(1).  3. The instant <i>Petition</i> does not fully comply with Probate Code § 10954 and CA Rules of Court 7.550 and 7.705 for waivers of account in estate matters, including the statements regarding whether notice of hearing is required to entities such as the Department of Health Care Services and the Victims' Compensation and Government Claims Board. Court may require further information regarding whether notices pursuant to Probate Code § 9202 were required for this estate.  <u>~Please see additional page~</u>
Cont. from 040814, 051314			
Aff.Sub.Wit.			
Verified	?		
✓ Inventory			
PTC	X		
✓ Not.Cred.	070609		
Notice of Hrg	X		
Aff.Mail	X		
Aff.Pub.			
Sp.Ntc.		<b>Distribution pursuant to intestate succession is to:</b>  <b>MARY SUE LANCASTER – entire estate.</b>	
Pers.Serv.			
Conf. Screen			
Letters	091509		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202	X		
✓ Order			
Aff. Posting		<b>Reviewed by:</b> LEG <b>Reviewed on:</b> 6/19/14 <b>Updates:</b> <b>Recommendation:</b> <b>File 1 – Lancaster</b>	
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

NEEDS/PROBLEMS/COMMENTS, continued:Notes:

- *Petition for Final Distribution* filed 2/28/2014 is signed but is not verified by the Petitioner pursuant to Probate Code § 1021 and CA Rule of Court 7.103. However, *Declaration of Petitioner Mary Sue Lancaster in Support of Petition for Order of Final Distribution* filed 2/28/2014, which contains all and substantially the same assertions as the *Petition for Final Distribution*, is verified.
- *Declaration of Mary Sue Lancaster* attached to the initial *Petition for Probate* filed 6/19/2009 states the only creditors of the Decedent of which she is aware are mortgages on the real property and a Visa credit card with a balance of **\$400.00**. Verified *Declaration of Petitioner Mary Sue Lancaster in Support of Petition for Order of Final Distribution* filed 2/28/2014 states all bill[s] and obligations of the estate have been paid or assumed by [her.]
- *Receipt on Distribution* filed 2/19/2014 states **MARY SUE LANCASTER** received from Administrator Mary Sue Lancaster the entirety of the estate [as specified in the petition] including **100%** interest in real property, and that she assumes all mortgage, tax, and other obligations owing on the real property distributed to her.

(1) First and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and his Attorney; and (3) Distribution

<b>DOD: 10/18/12</b>		<b>PUBLIC ADMINISTRATOR</b> , Conservator of the Estate, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>CONTINUED FROM 05/27/14</b> As of 06/20/14, nothing further has been filed in this matter.
		Account period: <b>06/26/12 – 10/18/12</b>	
		Accounting - <b>\$733,869.23</b>	
		Beginning POH - <b>\$655,215.93</b>	
		Ending POH - <b>\$578,727.55</b>	
<b>Cont. from 042414, 052714</b>		Subsequent account period: <b>10/19/12 – 02/20/14</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Accounting - <b>\$728,711.54</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Beginning POH - <b>\$578,727.55</b>	
<input type="checkbox"/>	<b>Inventory</b>	Ending POH - <b>\$605,382.95</b>	
<input type="checkbox"/>	<b>PTC</b>	(\$62,645.20 is cash)	
<input type="checkbox"/>	<b>Not.Cred.</b>	Conservator - <b>\$7,482.62</b> (26.09 staff hours @ \$76/hr. and 57.29 deputy hours @ \$96/hr.)	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Attorney - <b>\$2,500.00</b> (ok per Local Rule)	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Bond fee - <b>\$769.44</b> (ok)	
<input type="checkbox"/>	<b>Aff.Pub.</b>	Costs - <b>\$539.00</b> (filing fees and certified copies)	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Petitioner states that the conservatee has a trust and her assets will pass to that trust. Michael Smith, conservatee's son, is the trustee of her trust. Petitioner requests distribution of the remaining cash of \$51,354.17 and personal and real property be made to her son, in his capacity as trustee of her trust.	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>2620</b>	n/a	
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

**Petitioner prays for an Order:**

1. Finding that the conservatorship of the person and estate terminated on 10/18/12, the conservatee's date of death;
2. Approving, allowing and settling the first and final account;
3. Authorizing the conservator and attorney fees and commissions;
4. Authorizing payment of the bond fee and costs; and
5. Authorizing distribution of the balance of property as stated in the Petition (and above).

**Continued on Page 2**

<b>Reviewed by:</b> JF
<b>Reviewed on:</b> 06/20/14
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 2 – Smith</b>

**Objection to First and Final Account and Report of Conservator and Petition for Distribution** filed 04/22/14 by Mike (Butch) Smith, Jr. states:

1. The Petition for Distribution requests to distribute the remaining assets of the conservatorship estate to the conservatee's trust – to Michael Smith, as trustee of that Trust.
2. Petitioner reports that the conservatorship estate is holding cash assets in the amount of \$62,645.29 and other non-cash assets.
3. Objecting party alleges that the Jean Smith conservatorship estate owes Ben Smith (conservatee's husband) \$116,398.12 [itemization and reasoning provided].
4. Objector further alleges that the conservatee owes \$6,203.99 to the State of California for the 2011 tax year and states this should be cleared before distribution of the conservatorship estate.

**Ex Parte Petition to Remove Gary Hamilton as Trustee and Appoint Interim Trustee  
Pending Final Hearing**

<b>DOD: 03/13/11</b>		<p><b>JAMIE STAR HAMILTON THOMAS</b>, beneficiary, is Petitioner.</p> <p><b>Petitioner states:</b></p> <ol style="list-style-type: none"> <li>1. She is a beneficiary of the JAMES O. HAMILTON LIVING TRUST dated 04/16/03, as amended on 12/20/07 (the "Trust").</li> <li>2. The initial trustee of the Trust was James O. Hamilton. The nominated successor trustee was Gary Hamilton ("Gary"). Gary has been the acting successor trustee since James O. Hamilton's death on 03/13/11.</li> <li>3. The Trust provides that after the death of James O. Hamilton, the successor trustee should divide the trust assets into four shares for each of four beneficiaries: the Petitioner (Jamie Starr Hamilton Thomas), Joel Wade Hamilton ("Wade"), Cynthia Ann Thomas, and Richard Allen Thomas. The trustee shall make monthly payments of \$1,000.00 each to the four beneficiaries once that beneficiary reaches 60 years of age. If the assets of the Trust are not liquid, then the trustee must use his best efforts to liquidate the assets of the Trust to make these payments.</li> <li>4. At the time James O. Hamilton passed away, the Petitioner was over 60 years of age. Accordingly, she was entitled to monthly payments of \$1,000.00 starting March 13, 2011. Despite the clear provisions of the Trust, Gary has not made a single payment to Petitioner from the assets of the Trust.</li> <li>5. On 06/03/13, Petitioner filed a Verified Petition for (1) Removal of Trustee; (2) Accounting; (3) Surcharge; and (4) Approval of Attorney Fees (the "Petition"). The Petition asked the Court to remove Gary as trustee of the Trust and to appoint an independent third-party as trustee.</li> </ol> <p>Continued on Page 2</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED FROM 04/29/14</u></b></p> <p><b>Minute Order from 04/29/14 states:</b></p> <p><b>Ms. Sciver is appearing via CourtCall. The Court is advised that there is about \$100,000.00 in the account. Parties agree and the Court orders Jamie Thomas be provided \$1,000.00 per month beginning 05/01/14. Parties agree to vacate the settlement conference set for 05/12/14 and the evidentiary hearing scheduled for 06/16/14.</b></p> <ol style="list-style-type: none"> <li>1. Need proof of personal service at least 5 days prior to the hearing (per Order on Ex Parte Petition) filed 04/14/14. <b>Note:</b> Proof of service filed 04/21/14 states that a copy of the Ex Parte Petition was personally served on Paul Pimentel, attorney for Gary Hamilton, on 04/17/14; and proof of service filed 06/19/14 states that all parties were served by mail and fax on 06/18/14.</li> </ol>	
<b>Cont. from 042214, 042914</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			w/
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			x
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 06/20/14</p> <p><b>Updates:</b> 06/23/14</p> <p><b>Recommendation:</b></p> <p><b>File 3 – Hamilton</b></p>				

6. Gary filed a response to the Petition (the "Objection") stating that he had provided a trust accounting in October 2012 (the "Purported 2012 Accounting"). The Purported 2012 Accounting is not an accounting, but rather a list of assets of the Trust. The list includes two "missing items", namely gold coins worth \$245,000.00 and \$28,000.00 in cash.
7. Gary further admitted that he had purchased 20 acres in Fresno County (the "Fresno Property") from James O. Hamilton and given the Trust a promissory note for \$297,000.00 related to the purchase. Gary also gave the Trust a second promissory note for \$100,000.00. However, Gary admits that he never made a single payment on either note and now claims that he transferred the Fresno Property back to the Trust in lieu of making payments on the \$297,000.00 note.
8. Gary subsequently prepared an accounting dated 12/12/13 (the "Purported 2013 Accounting").
9. The Purported 2013 Accounting shows that the Trust holds a promissory note given by Wade to the Trust in the amount of \$25,000.00. Notwithstanding the fact that Wade owes money to the Trust, the Trust paid Wade \$1,000.00 a month from December 2011 through June 2013. Gary has marked these payments as repayments on loans Wade allegedly gave to the Trust. Moreover, the Purported 2013 Accounting does not show that Wade ever made any payments on the \$25,000.00 note he owed to the Trust.
10. In other words, Wade owed \$25,000.00 to the Trust; Wade paid approximately \$17,000.00 to the Trust; and yet the Trust then paid out approximately \$17,000.00 to Wade in payments of \$1,000.00 a month – the exact amount that should have been paid to the Petitioner.
11. Gary has chosen to characterize the payments to Wade as "loan repayment" from December 2011 – June 2013. However, the final "loan" shown on the Purported 2013 Accounting was allegedly given by Wade to the Trust on 06/21/13 – after the Trust had already "reimbursed" Wade for the alleged loan.
12. Although Gary as trustee holds title to over 600 acres of land in Oklahoma, he has not sold that property and has only collected \$10,000.00 in rent related to that property. Moreover, Gary has allegedly deeded the Fresno Property back to the Trust, but is not paying rent on the property and the Trust has no rental income from it (assuming that the Fresno Property was properly transferred to the Trust).
13. The Purported 2013 Accounting shows an estimated value for the Fresno Property of \$160,000.00. In other words, the Trust previously held a note for \$297,000.00 from Gary, and now only holds a property worth \$160,000.00 after Gary unilaterally transferred the Fresno Property to the Trust – a loss of \$137,000.00 to the Trust. Gary has attempted to get out of a bad land deal for himself personally by transferring the Fresno Property to the Trust, to the detriment of the beneficiaries of the Trust.
14. The Purported 2013 Accounting also shows that Wade owes the Trust under a promissory note in the amount of \$25,000.00, and that Cynthia Barton owes the Trust under a promissory note in the amount of \$30,000.00. Moreover, the Purported 2013 Accounting further shows that neither Wade nor Cynthia have made any payments to the Trust on either of those notes.
15. "A violation by the trustee of any duty that the trustee owes the beneficiary is a breach of trust" (Probate Code § 16400). A trustee has a duty to administer the trust according to the trust instrument. "The trustee has a duty to administer the trust solely in the interest of the beneficiaries". (*Id.* § 16002(a).) **Note:** Further authority provided in Petition.
16. Gary has violated numerous duties as trustee. Gary has refused to pay to the Petitioner the \$1,000.00 a month distributive payments she is owed under the terms of the Trust. At the same time, he has made \$1,000.00 a month payments to another beneficiary, Wade. Moreover, Gary has made the payments to Wade under the guise of "loan repayments," when in fact Wade owes money to the Trust and Gary's own accounting shows that Wade is not making payments on his debt.
17. Furthermore, Gary has engaged in self-dealing, insofar as he unilaterally chose to exchange a note worth \$297,000.00 that he owed to the Trust for a property worth \$160,000.00, a loss of \$137,000.00 to the Trust in favor of Gary.
18. Even though he has been trustee since 2011, Gary still has not sold the Oklahoma property in order to make the required payments to the Petitioner. Nonetheless, he has flown Wade to Oklahoma at the expense of the Trust and has paid Wade for unspecified "natural gas research".
19. Moreover, even though Gary identified \$245,000.00 in gold coins and \$28,000.00 as missing cash, Gary does not appear to have taken any steps to recover those assets for the Trust. Yet he continues to list these "assets" as assets of the Trust.

20. Petitioner has filed a formal petition to remove Gary as trustee, to which he has objected. An evidentiary hearing is set for June 2014. In the meantime, however, Gary is not paying the Petitioner the amounts she is owed under the Trust and he is looking the other way while Wade and Cynthia Barton fail to make payments on the debt they owe to the Trust. He is not maximizing the income to the Trust for the benefits of its beneficiaries and has failed to sell the Oklahoma land in order to fulfill his duties.
21. Accordingly, the Petitioner respectfully asks the Court remove Gary on an interim basis pending the final hearing on the removal petition, and to appoint a neutral third-party to administer the Trust while the parties litigate the removal issues and the accounting issues.
22. Petitioner has spoken to Bruce Bickel, who has stated that he is willing and able to serve as an independent trustee pending the evidentiary hearing and the Court's final decision on the Petition.

**Petitioner prays for an Order:**

1. Suspending Gary's powers to act as trustee of the Trust pending a final resolution of the Petition;
2. Appointing Bruce Bickel, or another independent fiduciary as decided by the Court, as special trustee to serve as trustee until final resolution of the Petition;
3. For attorney's fees and costs;
4. For any and all other orders that the Court deems proper and just.

**First Supplement to Ex Parte Petition to Remove Gary Hamilton as Trustee and Appoint Interim Trustee Pending Final Hearing** filed 04/21/14 states:

1. Exigent circumstances exist to appoint an interim trustee while the petition to remove Gary Hamilton as trustee is pending. Although the Court has set a settlement conference for 05/12 and a hearing on the petition for 06/16, those dates will be changed. Counsel for Gary Hamilton, Joanne Sanoian, passed away in March after the dates were set. New counsel Paul Pimentel has substituted in as counsel for Gary Hamilton as of late April. Counsel have conferred and a stipulation will be prepared to continue the trial dates for 120 days to allow Mr. Pimentel to adequately prepare for the hearing.
2. In addition, since the original filing of the petition, Gary Hamilton has prepared an accounting for the trust. The accounting shows that Gary has distributed \$17,000.00 to Wade, even though Wade owed the trust \$25,000.00; and at the same time, Gary has not distributed any funds to petitioner Jamie Thomas. Gary is favoring other beneficiaries over Jamie Thomas.
3. Because Gary is not fulfilling his monthly duties to distribute funds to Jaime Thomas and because this matter will not go to hearing until September at the earliest, exigent circumstances exist that require Gary to be removed pending a final hearing on the removal petition.
4. Consent of Bruce Bickel to act as interim successor trustee is attached.

**Declaration of Kurt Van Sciver Regarding Status on Ex Parte Petition to Remove Gary Hamilton as Trustee and Appoint Interim Trustee Pending Final Hearing** filed 06/19/14 states: At the hearing on 04/29/14, the trustee, Gary Hamilton, indicated that he would begin paying the \$1,000.00 per month to Jamie Thomas, starting May 1. The trustee further stated, through counsel, that the Clovis property had been sold and the Oklahoma property had been listed. The trustee did not pay Jamie the \$1,000.00 on May 1. Contact was made with Mr. Hamilton's attorney alerting him of the non-payment and requesting copies of the closing statement and the Oklahoma listing agreement. Mr. Hamilton's attorney, Mr. Pimentel, indicated that Mr. Hamilton did not have the correct address for Jamie Thomas. Mr. Pimentel was provided with Ms. Thomas' address. Mr. Pimentel provided a copy of the closing statement for the Clovis property and the Oklahoma listing. As of this date, Jamie Thomas has not received the \$1,000.00 payment for May or June and continues to seek the removal of Gary Hamilton as Trustee during the pendency of this action. The trustee has forgiven a note to himself, constituting a conflict of interest. The Trustee has not collected payments on notes to the Trust from two beneficiaries. The trustee has paid money to another beneficiary, Joel Wade Hamilton, and has flown Wade out to Oklahoma using Trust money, thereby favoring one beneficiary over Jamie. Jamie has suffered and will continue to suffer harm if the trustee is not removed in the interim and a neutral, non-family member appointed to run the Trust until the Court's final decision.

Atty Knudson, David N., sole practitioner (for Petitioner John Kevin Wilson, Administrator)

## (1) First and Final Report and (2) Petition for Final Distribution on Waiver of Accounting, and for (3) Statutory Compensation

<b>DOD: 3/18/2013</b>		<b>JOHN KEVIN WILSON</b> , brother and Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need proposed order pursuant to Local Rule 7.1.—Submitted 6/23/14										
		Accounting is waived.											
<b>Cont. from</b>		I & A — <b>\$593,973.69</b>	<table border="1"> <tr> <td colspan="2"><b>Reviewed by:</b> LEG</td> </tr> <tr> <td colspan="2"><b>Reviewed on:</b> 6/19/14</td> </tr> <tr> <td colspan="2"><b>Updates:</b> 6/23/14</td> </tr> <tr> <td colspan="2"><b>Recommendation:</b> <b>SUBMITTED</b></td> </tr> <tr> <td colspan="2"><b>File 4 - Wilson</b></td> </tr> </table>	<b>Reviewed by:</b> LEG		<b>Reviewed on:</b> 6/19/14		<b>Updates:</b> 6/23/14		<b>Recommendation:</b> <b>SUBMITTED</b>		<b>File 4 - Wilson</b>	
<b>Reviewed by:</b> LEG													
<b>Reviewed on:</b> 6/19/14													
<b>Updates:</b> 6/23/14													
<b>Recommendation:</b> <b>SUBMITTED</b>													
<b>File 4 - Wilson</b>													
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH — <b>\$593,973.69</b> (\$9,273.65 is cash)											
<input checked="" type="checkbox"/>	<b>Verified</b>												
<input checked="" type="checkbox"/>	<b>Inventory</b>	Administrator — <b>waives</b>											
<input checked="" type="checkbox"/>	<b>PTC</b>	Attorney — <b>\$14,879.47</b> (statutory)											
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>												
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Costs — <b>\$435.00</b> (for filing fee; \$856.25 paid by Petitioner for filing fee, publication, certified copies)											
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/											
<input type="checkbox"/>	<b>Aff.Pub.</b>												
<input type="checkbox"/>	<b>Sp.Ntc.</b>												
<input type="checkbox"/>	<b>Pers.Serv.</b>	<b>Distribution pursuant to intestate succession is to:</b>											
<input type="checkbox"/>	<b>Conf. Screen</b>	<b>JOHN K. WILSON</b> – entire estate consisting of real property, vehicle, trailer, household furniture, furnishings, and personal belongings, and <b>\$9,273.65 cash.</b>											
<input type="checkbox"/>	<b>Letters</b>												
<input type="checkbox"/>	<b>Duties/Supp</b>												
<input type="checkbox"/>	<b>Objections</b>												
<input type="checkbox"/>	<b>Video Receipt</b>												
<input type="checkbox"/>	<b>CI Report</b>												
<input checked="" type="checkbox"/>	<b>9202</b>												
<input checked="" type="checkbox"/>	<b>Order</b>	<input checked="" type="checkbox"/>											
<input type="checkbox"/>	<b>Aff. Posting</b>												
<input type="checkbox"/>	<b>Status Rpt</b>												
<input type="checkbox"/>	<b>UCCJEA</b>												
<input type="checkbox"/>	<b>Citation</b>												
<input checked="" type="checkbox"/>	<b>FTB Notice</b>												



Atty Renge, Lawson K., sole practitioner (for Petitioner Charles L. Robinson)

## Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

<b>DOD: 2/19/2014</b>		<b>CHARLES (CHAD) L. ROBINSON</b> , son, is Petitioner and requests appointment as Administrator without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>		Full IAEA — OK	<p>1. Item 5(a)(7) of the <i>Petition</i> states there exists issue of a predeceased child. Item 8 of the <i>Petition</i> lists grandchildren, great grandchildren, and great-great grandchildren of Decedent. <i>Attachment 3(d)(3)</i> of the <i>Petition</i> states <b>DONNA McBEE</b>, daughter, predeceased the Decedent on 9/22/2010. However, <i>Attachment 3(d)(3)</i> of the <i>Petition</i> indicates that the Petitioner is the only surviving heir at law of Decedent entitled to receive Decedent's estate property according to intestate succession. Pursuant to Probate Code §§ 6402 and 240, need the names of the issue of the predeceased child of Decedent, who are entitled to a share of the Decedent's estate under intestate succession.</p> <p>2. Need waivers of bond from all persons entitled to distribution, or bond posted of <b>\$170,000.00</b>.</p>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Decedent died intestate.	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	Residence — Fresno	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Publication — Business Journal	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	Probate Referee: <b>Steven Diebert</b>	
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
			<b>Estimated value of the Estate:</b>
			Personal property - <b>\$170,000.00</b>
			<b>Total</b> - <b>\$170,000.00</b>
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 6/23/14
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 5 - Robinson</b>

**6 Louis Brosi, Sr. (Trust)****Case No.****07CEPR01213**

Atty David M. Gilmore and Ryan M. Janisse (for Cindy Snow Henry – Beneficiary – Petitioner)  
 Atty Armo, Lance (for Robert Snow)  
 Atty Paul Franco (for Louis Brosi, III)  
 Atty Wilson, Joshua G. (of Bakersfield, for Louis Brosi, Jr.)

**Status Hearing Re: Settlement Agreement**

	<b>CINDY SNOW HENRY</b> filed Notice of Motion and Motion to Compel Performance under Settlement Agreement on 3-15-11.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Ms. Henry also filed Petition to Remove Trustee; Appoint Public Administrator as Trustee; Require Trustee Correct Title; and Compel Trustee to Account on 11-5-12.	
<b>Aff.Sub.Wit.</b>		<ol style="list-style-type: none"> <li><b>Need order approving Ms. Henry's petition filed 11-5-12 pursuant to the Minute Order of 3-3-14.</b></li> <li><b>Need agreement per Minute Order 6-3-14.</b></li> <li><b>On 3-3-14, the Court appointed Doris Brosi as trustee. However, Doris Brosi has not made an appearance in this matter.</b></li> </ol> <p><b>Therefore, a filing/appearance fee of \$435 is due from Doris Brosi.</b></p>
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>	<p>The Court has held various settlement conferences and Court Trial hearings since then, including re: lot split and related matters.</p> <p><b>On 3-3-14, the Court granted Ms. Henry's petition filed 11-5-12. Minute Order 3-3-14 states:</b> The Court removes Louis Brosi, Jr. as the trustee and appoints Doris Brosi as successor trustee. An offer is made in open court. Mr. Gilmore's client is directed to respond to the offer by no later than 5:00 p.m. on 3/5/14. Parties agree that Mr. Armo's client will be paid in full \$100,000.00 by the close of business tomorrow with a joint check made out to both Mr. Armo and Robert Snow. The litigation guarantee and appraisal as to 6706 N. Chestnut shall be due by 3/12/14. Additionally, the \$100,000.00 payment to Cindy Snow Henry as well as the first monthly installment shall be due by 4/1/14. Continued to 4/1/14 @ 10:00 a.m. Dept. 303</p> <p><b>At continued settlement conference on 6-3-14, the Court made additional orders. Minute Order 6-3-14 states:</b> Parties engage in settlement discussions with the Court. Parties reach a settlement agreement as fully set forth on the record. Parties agree that the petitions will be dismissed with prejudice and the hearings set for 6/9/14 will be vacated. The Court notes that Cindy Snow Henry is not present, but has been in contact with Mr. Gilmore. Upon inquiry by the Court, Louis Brosi, III and Mr. Gilmore on behalf of his client agree to the terms and conditions of the agreement. Agreement to be prepared by Mr. Gilmore and provided to Mr. Franco by 6/6/14.</p> <p><b>Matter set for Status Hearing on 6/24/14.</b> If everything is completed by 6/24/14, no appearances will be necessary and the matter will be taken off calendar. Set on 6/24/14 @ 9:00 a.m. Dept. 303 for: Status Hearing Re: Settlement Agreement</p>	

**Reviewed by:** skc**Reviewed on:** 6-20-14**Updates:****Recommendation:****File 6 - Brosi**

Age: 91	PUBLIC GUARDIAN, was appointed Conservator of Person and Estate on 11/05/08.	NEEDS/PROBLEMS/COMMENTS:
	Order Settling the Second Account filed 01/22/13 set this matter for a status hearing regarding filing of the Third Account.	<u>CONTINUED FROM 05/23/14</u>  <i>As of 06/20/14, nothing further has been filed in this matter.</i>  1. Need Third Account.
Cont. from 032814, 041114, 052314		
Aff.Sub.Wit.	Status Report filed 06/20/14 states: the Public Guardian is still working on its accounting in this matter. It is anticipated that the account and report will be ready to be filed within the next 45 days. Therefore a continuance of 45 days is requested.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 06/20/14
		Updates: 06/23/14
		Recommendation:
		File 7 – Fly

<b>DOD: 01/15/2013</b>	<b>PAMELA S. GRIGGS</b> , was appointed Executor with full IAEA without bond on 03/20/2013.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 05/23/2014</b>  1. Need First Account or Petition for Final Distribution.
	Letters were issued on 03/21/2013	
<b>Cont. from 052314</b>	Inventory & Appraisal Partial No. 1 filed 06/24/2013 - \$69,045.71	
<b>Aff.Sub.Wit.</b>	Inventory & Appraisal Final filed 07/18/2013 - \$5,450.00	
<b>Verified</b>	Minute Order dated 03/20/2013 set this status hearing for the filing of the First Account or Final Distribution.	
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>	<b>Former Status Report re Frist and Final Account filed 05/21/2014</b> states the attorney's office is currently in the process of preparing the petition and first and final account current in this matter. It is anticipated that the accounting will be filed within the next three weeks. Therefore, it is requested that this status hearing be continued for 30 days to allow time for the executor and her attorney to complete the preparation of the accounting.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>	<b>Status Report filed 06/20/14</b> states: The accounting is still being prepared. It is anticipated that the report and account will be ready to be filed within the next 30 days. Therefore, it is requested that this status hearing be continued for 30 days to allow time for the executor and her attorney to complete the account and report.	
<b>Order</b>		
<b>Aff. Posting</b>		<b>Reviewed by:</b> LV
<b>Status Rpt</b>		<b>Reviewed on:</b> 06/19/2014
<b>UCCJEA</b>		<b>Updates:</b> 06/23/14 JF
<b>Citation</b>		<b>Recommendation:</b>
<b>FTB Notice</b>		<b>File 8 - Bertell</b>

Atty Kugelman, Sharon (pro per – maternal grandmother/guardian – objector)

Atty Kugelman, Ronald (pro per – maternal grandfather/guardian – objector)

Atty Shea, Rachel (pro per – mother/Petitioner)

## Petition for Termination of Guardianship

Age: 6		RACHEL SHEA, mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		SHARON KUGELMAN and RONALD KUGELMAN, maternal grandparents, were appointed as Co-Guardians of the Person on 02/28/12. – Sharon was personally served on 06/12/14	1. Need Notice of Hearing. 2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Termination of Guardianship or Consent & Waiver of Notice or Declaration of Due Diligence for: a. Ronald Kugelman (maternal grandfather – guardian) b. Joshua Gomez (father) c. Paternal grandparents d. Any siblings age 12 and over.
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	w/	
	Conf. Screen		
	Letters		
	Duties/Supp		
✓	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Father: JOSHUA GOMEZ	
		Paternal grandfather: NOT LISTED Paternal grandmother: NOT LISTED	
		Petitioner states that she wants to be reunified with her daughter. She states that she has created a healthy and stable home, has a stable job and is currently involved in a parenting class to better her parenting skills.	
		Objection to Guardianship Termination filed 06/13/14 by Guardians, Sharon and Ronald Kugelman, states: when Rachel was released from prison she lived in their home for 11 months. On 07/23/13, Rachel left the home without explanation and without considering the emotional affect her leaving might have on Jenna. Since moving out, she has not made any attempt to contact Jenna or inquire as to her well-being. Rachel plans to take Jenna to the state of Wyoming to live. Objectors state that Jenna does not have any family there and they are concerned about what would happen to her if Rachel abandons her again. Objectors state that they have no verification that Rachel has made the changes she says she has made or what her living environment is like in Wyoming. Objectors further state that Rachel does not appear to understand the confusion, sadness or other emotional affects her going in and out of her children's lives causes. Objectors ask that the Court deny the Petition to Terminate the Guardianship and allow Jenna to remain in their safe, stable and loving home.	
		Court Investigator Samantha Henson filed a report on 06/17/14.	
			Reviewed by: JF
			Reviewed on: 06/20/14
			Updates:
			Recommendation:
			File 9 - Kugelman

(1) Waiver of Accounting and (2) Petition for Final Distribution, Statutory  
 Commissions/Fees, (3) Request to withhold in Reserve

<b>DOD: 11/29/12</b>		<b>TOM STEINGRABER</b> , Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need <i>Notice of Hearing</i> .  2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> for: a. Sara Harris b. Robert Steingraber  3. The Petition does not address the notices required under Probate Code § 9202(b) – Notice to Victim's Compensation Board and 9202(c) – Notice to the Franchise Tax Board.  4. Need Order. <b>Note:</b> All orders or decrees in probate matters must be complete in themselves. Orders shall set forth all matters ruled on by the court, the relief granted, and the names of persons, descriptions of property and/or amounts of money affected with the same particularity required of judgments in general civil matters. <b>Monetary distributions must be stated in dollars, and not as a percentage of the estate.</b>
		Accounting is waived.	
<b>Cont. from</b>		I & A - \$471,980.41	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH - \$445,800.00	
<input checked="" type="checkbox"/>	<b>Verified</b>	Administrator - waived	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Attorney - n/a	
<input checked="" type="checkbox"/>	<b>PTC</b>	Closing - \$3,000.00	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	<b>Distribution, pursuant to intestate succession, is to:</b>	
<input type="checkbox"/>	<b>Aff.Mail</b>	Tom Steingraber - 1/3	
<input type="checkbox"/>	<b>Aff.Pub.</b>	Sara Harris - 1/3	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Robert Steingraber - 1/3	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b> 03/20/13		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>Reviewed by:</b> JF			
<b>Reviewed on:</b> 06/20/14			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 10 - Steingraber</b>			

**First Account Current and Report of Conservator and Petition for its Settlement**

			<b>JOYCE V. DAVIS</b> , Conservator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Need amended account. Petitioner may wish to seek assistance from an attorney going forward.</b>  1. The account is not presented in the format required by Probate Code §§ 2620, 1060, and does not use mandatory Judicial Council forms for the required schedules (summary, receipts, disbursements, etc.). 2. Need care facility statements and original account statements for all accounts pursuant to Probate Code §2620(c). 3. Need Notice of Hearing. 4. Need Proof of service of Notice of Hearing on the Conservatee at least 15 days prior to the hearing pursuant to Probate Code §1460. 5. Petitioner indicates that the Conservatee owns a vehicle and describes DMV issues; however, no vehicle is listed on the Inventory and Appraisal. 6. The Court may require clarification regarding the Met Life and State Farm policies. They were appraised as cash by the Conservator on the Supp. I&A; however, it appears these policies are not cash assets. Need clarification. 7. In the amended petition, the Court may require a statement as to the status of the house: It appears the Conservatee has not lived there since April 2012 (over two years). Petitioner states nothing has been sold or removed from the house. What is the status of the house? Is it vacant? Is it secure? Is it being maintained? Is it rented and producing income for the Conservatee? Please note that to sell the home, Court approval is required pursuant to Probate Code §2540 and Court confirmation of the sale is also required.
			Current bond is \$333,000.00.	
			Account period: 3-14-13 through 3-13-14	
	<b>Aff.Sub.Wit.</b>		Accounting: Not provided Beginning POH: \$781,540.22 Ending POH: \$779,725.86 (\$85,245.86 cash plus real property, and retirement and insurance accounts)  Conservator: Not requested  Petitioner sincerely hopes: 1) That this account and report be approved and settled; and 2) That the acts of the Conservators shown in the account and report be approved.	
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
	<b>Notice of Hrg</b>	X		
	<b>Aff.Mail</b>	X		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
✓	<b>CI Report</b>			
	<b>2620(c)</b>	X		
	<b>Order</b>	X		
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc <b>Reviewed on:</b> 6-20-14 <b>Updates:</b> <b>Recommendation:</b> <b>File 11 - Thomas</b>	

Status Hearing Re: Filing of the Inventory and Appraisal

<b>DOD: 5/1/13</b>	<p><b>KAYING LO</b> was appointed as Executor with full IAEA authority and without bond on 1/7/14.</p> <p>Letters issued on 1/7/14.</p> <p>Inventory and appraisal is now due.</p> <p><b>Minute Order dated 1/7/14</b> set this status hearing for the filing of the inventory and appraisal.</p> <p><b>Minute Order dated 5/9/14 states</b> no appearances. The Court orders Kaying Lo to be personally present on 6/24/14. Copy of the minute order mailed to Kaying Lo on 5/16/14.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need inventory and appraisal or current written status report</b> pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 6/23/14</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 12 - Stratton</b></p>



**13 Norma Deloise Macy (Det Succ)**  
**Atty Sarabia, Constance (Pro Per – Petitioner – Daughter)**  
**Atty Macy, Mark (Pro Per – Petitioner – Son)**  
**Atty Macy, Eric (Pro Per – Petitioner – Son)**

**Case No. 14CEPR00253**

**Amended Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 12/20/2013</b>		<p><b>CONSTANCE SARABIA</b>, daughter, <b>MARK MACY</b>, son, and <b>ERIC MACY</b>, son, are petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I &amp; A - \$106,800.00</p> <p>Decedent died intestate</p> <p>Petitioner requests Court determination that decedent's property located at 2966 E. Gilbert Fresno, Ca and 1997 Dodge Minivan pass to Constance Sarabia.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Attachment 11 does not provide the decedent's interest in the real property.</p> <p>2. Need Order.</p> <p><b>Note:</b> A Notice of Hearing with a proof of service by mail, along with an order were stapled to the petition. Each document must be filed separately.</p>
<b>Cont. from 050514, 060414</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b> n/a		
<input type="checkbox"/>	<b>Aff.Mail</b> n/a		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 06/19/2014</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 13 - Macy</b></p>	

**14 Orion Elliott Husted (GUARD/P)****Case No. 14CEPR00368****Atty Husted, Larry G. (pro per – paternal grandfather/Petitioner)****Atty Husted, Susan M. (pro per – paternal grandmother/Petitioner)****Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

<b>Age: 10</b>		<b><u>NO TEMPORARY REQUESTED</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>LARRY HUSTED and SUSAN HUSTED,</b>		1. Need <i>Notice of Hearing</i> . 2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Annette Fawn Husted (mother) – Personal service required. <b>Note:</b> Declaration of Due Diligence filed 04/22/14 states that the last contact was in February 2014 and phone number is now disconnected. b. Maternal grandparents – service by mail sufficient	
		paternal grandparents, are Petitioners.			
		Father: <b>MARK ELLIOT HUSTED</b> – Consent & Waiver of Notice filed 04/22/14			
<b>Cont. from</b>		Mother: <b>ANNETTE FAWN HUSTED</b> – Declaration of Due Diligence filed 04/22/14			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>				
<input checked="" type="checkbox"/>	<b>Verified</b>				
<input type="checkbox"/>	<b>Inventory</b>				
<input type="checkbox"/>	<b>PTC</b>				
<input type="checkbox"/>	<b>Not.Cred.</b>				
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Pub.</b>				
<input type="checkbox"/>	<b>Sp.Ntc.</b>				
<input type="checkbox"/>	<b>Pers.Serv.</b>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>				
<input checked="" type="checkbox"/>	<b>Letters</b>				
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>				
<input type="checkbox"/>	<b>Objections</b>				
<input type="checkbox"/>	<b>Video Receipt</b>				
<input checked="" type="checkbox"/>	<b>CI Report</b>				
<input type="checkbox"/>	<b>9202</b>				
<input checked="" type="checkbox"/>	<b>Order</b>				
<input type="checkbox"/>	<b>Aff. Posting</b>				
<input type="checkbox"/>	<b>Status Rpt</b>				
<input checked="" type="checkbox"/>	<b>UCCJEA</b>				
<input type="checkbox"/>	<b>Citation</b>				
<input type="checkbox"/>	<b>FTB Notice</b>				
		<b>Court Investigator Jennifer Daniel filed a report on 06/17/14.</b>			
				<b>Reviewed by:</b> JF	
				<b>Reviewed on:</b> 06/20/14	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 14 - Husted</b>	

<b>Age: 9 months</b>		<b><u>NO TEMPORARY REQUESTED</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>HELEN BANDA and JUAN BANDA, JR.,</b>		1. Need <i>Notice of Hearing</i> .	
		maternal grandmother and step-		2. Need proof of service at least	
		grandfather, are Petitioners.		15 days before the hearing of	
				<i>Notice of Hearing</i> with a copy	
<b>Cont. from</b>		Father: <b>JOSEPH MARQUEZ</b> – <i>Personally</i>		of the <i>Petition for Appointment</i>	
	<b>Aff.Sub.Wit.</b>		<i>served with Notice of Hearing only on</i>	of <i>Guardian of the Person</i> <u>or</u>	
✓	<b>Verified</b>		<i>05/06/14</i>	Consent & Waiver of Notice <u>or</u>	
	<b>Inventory</b>			Declaration of Due Diligence	
	<b>PTC</b>		Mother: <b>DELEIGHLA ENOS</b> – <i>Consent &amp;</i>	for:	
	<b>Not.Cred.</b>		<i>Waiver of Notice filed 04/23/14</i>	a. Joseph Marquez (father) –	
	<b>Notice of Hrg</b>	x	Paternal grandfather: UNKNOWN	personal service required,	
	<b>Aff.Mail</b>	x	Paternal grandmother: DENISE PEREZ	note: proof of service filed	
	<b>Aff.Pub.</b>		Maternal grandfather: NOT STATED	05/12/14 indicates that he	
	<b>Sp.Ntc.</b>			was personally served with	
✓	<b>Pers.Serv.</b>	w/o	<b>Petitioners state</b> that neither parent is	a <i>Notice of Hearing</i> only	
✓	<b>Conf. Screen</b>		able to care for Giana at this time. Her	(no copy of the <i>Petition</i> ) on	
✓	<b>Letters</b>		mother is currently enrolled in WestCare	05/06/14	
✓	<b>Duties/Supp</b>		rehab facility and her father is currently	b. Paternal grandfather –	
	<b>Objections</b>		incarcerated.	service by mail sufficient	
	<b>Video Receipt</b>		<b>Court Investigator Samantha Henson</b>	c. Denise Perez (paternal	
✓	<b>CI Report</b>		<b>filed a report on 06/17/14.</b>	grandmother) – service by	
	<b>9202</b>			mail sufficient	
✓	<b>Order</b>			d. Maternal grandfather –	
	<b>Aff. Posting</b>			service by mail sufficient	
	<b>Status Rpt</b>				
✓	<b>UCCJEA</b>			<b>Reviewed by:</b> JF	
	<b>Citation</b>			<b>Reviewed on:</b> 06/23/14	
	<b>FTB Notice</b>			<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 15 – Marquez-Enos</b>	

**16 Jenny Santana (Det Succ)**

Case No.14CEPR00429

Atty Santana, Hector (Pro Per Petitioner)

Atty Santana, Mary (Pro Per Petitioner)

Atty Santana, John (Pro Per Petitioner)

**Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 10-25-13</b>		<b>HECTOR SANTANA, MARY SANTANA, and JOHN SANTANA</b> , are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		40 days since DOD	<b>1. The original will has not been deposited with the Court pursuant to Probate Code §8200.</b>
		No other proceedings	
	<b>Aff.Sub.Wit.</b>	Will dated 8-19-09 devises the entire estate to Petitioners.	
✓	<b>Verified</b>	Petitioners request Court determination that the Decedent's 100% interest in certain real property located at 1039 N. Roosevelt and 73 E. Lorena passes to Petitioners in equal 1/3 shares.	
✓	<b>Inventory</b>		
✓	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	w	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 6-20-14
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 16 - Santana</b>

**Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)**

<b>Age: 50</b>		<b><u>NO TEMPORARY REQUESTED</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>CHAO HER</b> , mother, is Petitioner, and requests appointment as Conservator of the Person with Medical Consent Powers.		<b>Court Investigator advised rights on 06/06/14.</b>	
		Voting rights affected.		<b>Voting Rights affected, need minute Order.</b>	
<b>Cont. from</b>		<b>Petitioner states</b> [no reason for the conservatorship was stated in the Petition]		1. Need Notice of Hearing.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<input type="checkbox"/>		2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with copy of the Petition for Appointment of Conservator of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:	
<input checked="" type="checkbox"/>	<b>Verified</b>	<input type="checkbox"/>		a. Leng Vang (brother)	
<input type="checkbox"/>	<b>Inventory</b>	<input type="checkbox"/>		b. Chue Vang (brother)	
<input type="checkbox"/>	<b>PTC</b>	<input type="checkbox"/>		c. Ger Vang (brother)	
<input type="checkbox"/>	<b>Not.Cred.</b>	<input type="checkbox"/>		3. Need Capacity Declaration from physician regarding medical consent powers.	
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Pub.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>	<input type="checkbox"/>	w/		
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>Letters</b>	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Objections</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Video Receipt</b>	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>CI Report</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>9202</b>	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>Order</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Aff. Posting</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Status Rpt</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>UCCJEA</b>	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>Citation</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>FTB Notice</b>	<input type="checkbox"/>			
				<b>Reviewed by:</b> JF	
				<b>Reviewed on:</b> 06/23/14	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 17 - Vang</b>	

Atty Glazebrook, Sara (pro per Petitioner/mother)

Atty Glazebrook, David (pro per Petitioner/father)

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 18 years	<b>THERE IS NO TEMPORARY.</b> No temporary was requested.		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Court Investigator Advised Rights on 6/13/14</b>  <b>Voting Rights Affected need Minute Order.</b>  1. Need Notice of Hearing.  2. Need proof of service of the Notice of Hearing along with a copy of the petition on: a. Bob Glazebrook (paternal grandfather) b. Neoma Glazebrook (paternal grandfather) c. Hailey Glazebrook (sister) d. Jennifer Glazebrook (sister) e. Ryan Steege (brother) f. Megann Steege (sister) g. Madison Glazebrook (sister) h. CVRC (needs a 30 day notice)  3. Capacity Declaration is incomplete at #1. It fails to list the name, address and telephone number of the physician.  4. Need Video Viewing Receipt for both proposed conservators.
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	X		
<input type="checkbox"/> Aff.Mail	X		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt	X		
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input checked="" type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

**SARA GLAZEBROOK and DAVID GLAZEBROOK**, parents are petitioners and request appointment as conservator of the person with medical consent powers.

**Declaration of James C. Horspool, D.O., 3/24/14**

**Voting Rights Affected.**

**Petitioners state** the proposed conservatee has a diagnosis of Downs Syndrome with severe developmental delay. He requires constant supervision and help with all aspects of daily living.

**Court Investigator Samantha Henson's Report filed on 6/17/14**

**Reviewed by: KT**

**Reviewed on: 6/23/14**

**Updates:**

**Recommendation:**

**File 18 - Glazebrook**

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450).

<b>DOD: 03/14/14</b>		<b>W. LAIRD DURLEY</b> , son/named Executor without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need name and date of death of deceased spouse pursuant to Local Rule 7.1.1D.  2. It does not appear that the original will has been deposited with the Court. Need original Will.  3. Need Confidential Supplement to Duties and Liabilities.
		Full IAEA - OK	
<b>Cont. from</b>		Will dated 07/23/08	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>	x	
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>Estimated Value of the Estate:</b> Personal property - \$715,078.00 Real property - 783,000.00 <b>Total - \$1,498,078</b>  Probate Referee: <b>STEVEN DIEBERT</b>			
<b>Reviewed by:</b> JF			
<b>Reviewed on:</b> 06/23/14			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 19 - Durley</b>			